

How to Submit Bids Online

Central Procurement Office

Table of Contents

Introduction	3
Accessing the Supplier Portal	3
Logging In to the Supplier Portal	4
Viewing Events	4
Bidding on an Event	7
Viewing Event Attachments	8
Answering Event Questions	9
Entering a Bid Price	11
Accessing Line Bid Factors	12
Submitting a Bid	16
Submitting an Alternative Bid	17
Viewing My Event Activity	19
Viewing Purchase Order	20
Viewing Invoices	22
Viewing Receipts	

Introduction

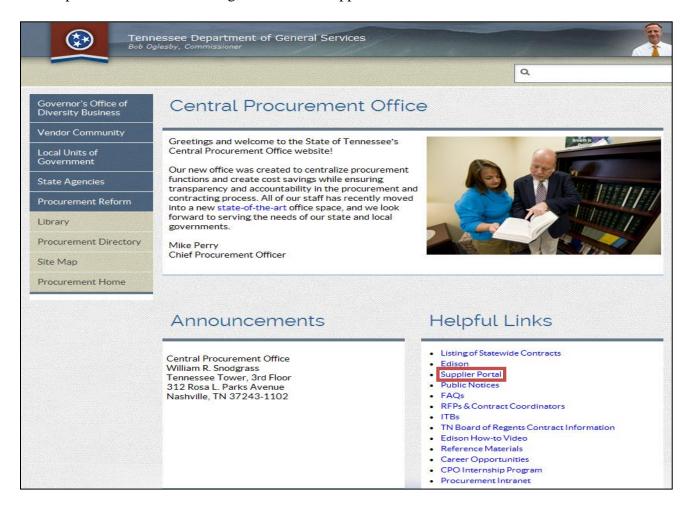
This manual is intended to aid suppliers when entering a bid into the eSupplier portal. Follow the steps below to successfully enter an electronic response to an Event.



A tip for viewing attachments in Edison is to hold down the Ctrl button on the keyboard while also clicking View. Continue to hold down the Ctrl key until the document loads.

Accessing the Supplier Portal

Navigate to the Central Procurement Office website via the URL http://tn.gov/generalserv/cpo/. Under the Helpful Links section heading, click on the Supplier Portal link.



Logging In to the Supplier Portal

Use the main Supplier Portal webpage to log in to the system.

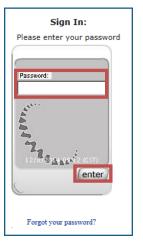
- 1. Click the **HERE** link to sign-on.
- 2. Enter your **User ID** in to the **Access ID** field.
- 3. Click **Continue** to be brought to the screen to enter your password.
- 4. Enter your **Password** in the Password field.
- 5. Click Enter.





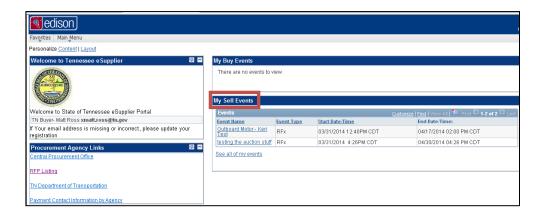


If you experience problems with logging in to the Supplier Portal, contact the Edison HelpDesk at 615-741-4357 or 866-376-0104.



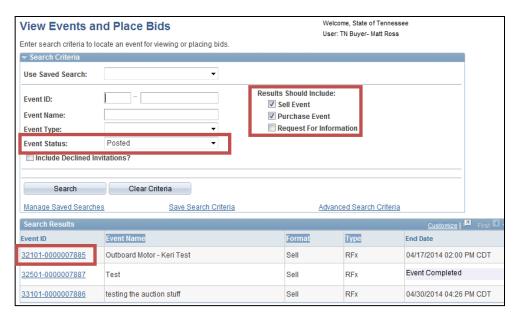
Viewing Events

Once you have logged in, bid opportunities will be displayed on the Supplier Portal home screen in the My Sell Events section.

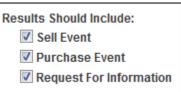


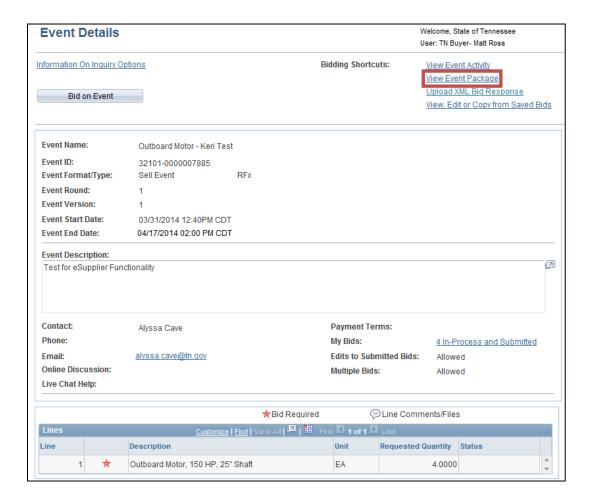
To view all available bid opportunities, do the following:

1. Click on the See all of my events link below the events that are displayed. This will display the View Events and Place Bids screen.



- 2. Verify all the checkboxes in the *Results Should Include:* section are checked. Select any that need to be selected.
- 3. Under the Search Criteria header, verify that Event Status reads "Posted."
- 4. Click Search . The search results will populate under the Search Results header.
- 5. To view an event, click on the appropriate **Event ID link** (i.e. 32101-0000007885) in the Event ID section. This will display the *Event Details* screen.

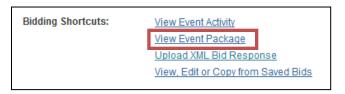




6. To view specific information about the event (Event Bid Package and Event Details), click on the **View Event Package** link in the *Bidding Shortcuts:* section.



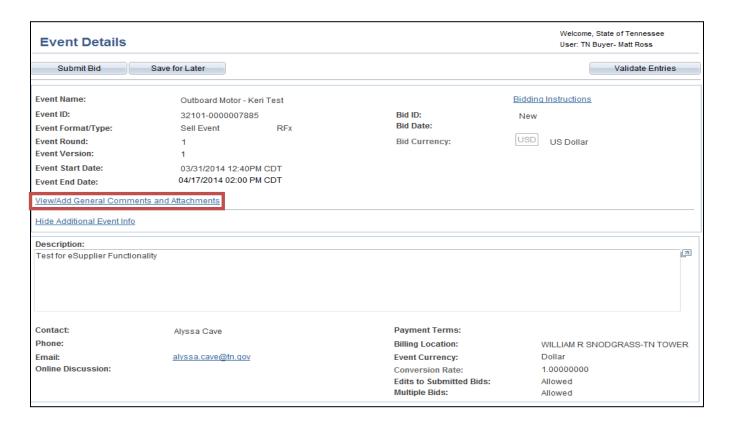
Event attachments **CANNOT** be viewed from this page. Also, an event **CANNOT** be bid on from this page.



Bidding on an Event

To access event documentation, comments, and the area where required event information can be entered in order to bid on an event, click the Bid on Event button at the top of the *Event Details* screen.

An expanded *Event Details* screen loads with Event information, links, and the functionality to bid on the event.



There are three (3) buttons at the top and bottom of the *Event Details* screen with specific functions that pertain to bidding on an event:

- Save for Later click this button to save the bid in progress.
- Submit Bid click this button to submit the bid.
- Validate Entries click this button to validate bid response(s).



If **Submit Bid** or **Validate Entries** is selected and all pertinent information has not been completed, the following message box will appear with instructions for what to address before submitting the bid.

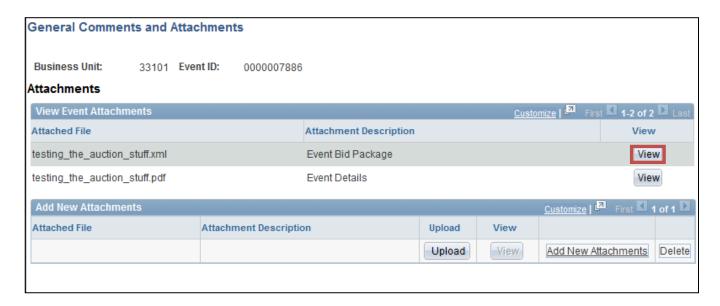




Viewing Event Attachments

Event attachments/documents (i.e. Terms & Conditions, specifications, etc.) are accessible from the *General Comments and Attachments* screen. To view attached event documents, do the following:

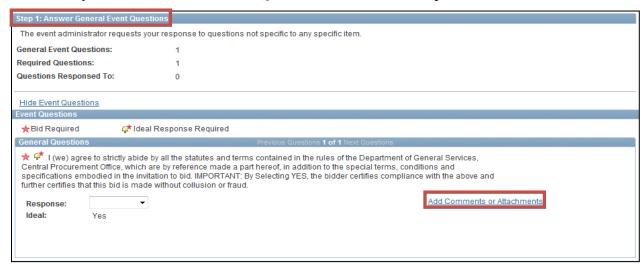
1. Click the View/Add General Comments and Attachments link in the box containing basic event information at the top of the expanded *Event Details* screen.



- 2. On the *General Comments and Attachments* screen under the *View Event Attachments* header, click view next to each event file to view it.
- 3. To return to the *Event Details* screen:
 - a. If you **added** comments or attachments, screen, click
 - b. If you did not add comments or attachments, click Cancel.

Answering Event Questions

Event questions must be answered in order to successfully submit a bid for an event. They are found below the *Step 1: Answer General Event Questions* header on the expanded *Event Details* screen.



To answer event questions, do the following:

- 1. Fill in the comment section for open response event questions.
- 2. From the drop-down menu, select the appropriate response to the event question.

To add a comment or to attach a document to an event question, do the following:

1. Click the Add Comments or Attachments link to the right of the respective event question. The *Question Comments and Attachments* screen loads.



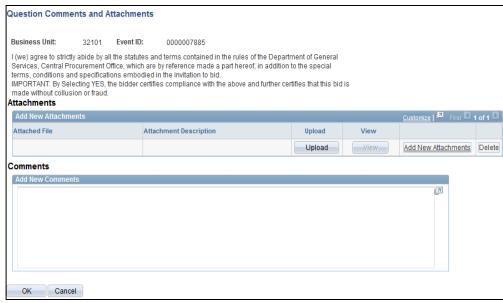
- 2. Click in the *Attachments* section to attach a file to the event question.
- 3. In the *File Attachment* box, click **Browse**.
- 4. In the *Choose File to Upload* box, navigate to the document.
- 5. Select the document.
- 6. Verify the file name populates the in *File name* field.
- 7. Click **Open**. The *File Attachment* box is displayed again.
- 8. In the *File Attachment* box, verify the file pathway populates in the Browse... field.
- 9. Click Upload in the *File Attachment* box.





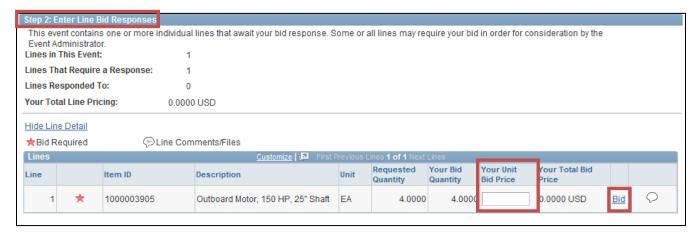


- 10. Verify the pertinent document populated in the *Attached File* area of the *Add New Attachments* section.
- 11. In the *Attachment Description* field, type the name of the document.
- 12. You may add comments by typing in the *Comments* section.
- 13. Click when the expanded *Event Details* screen.



Entering a Bid Price

A bid price must be entered in order to successfully submit a bid for an event. The Line information for bidding is below the *Step 2: Enter Line Bid Responses* header on the expanded *Event Details* page.

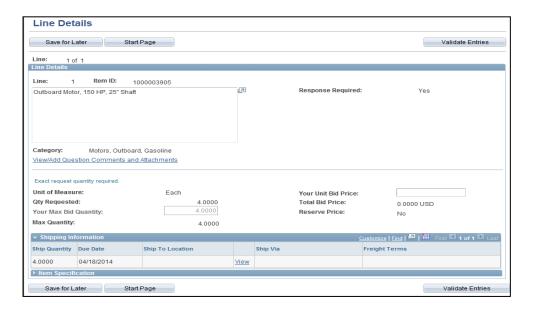


To enter a bid price, do the following:

- 1. Locate the line on which you want to bid.
- 2. Enter Your Unit Bid Price for that line item.

More in-depth options for placing a bid are available for each line of an event. These options are located on the *Line Details* screen. To access the *Line Details* screen, do the following:

1. Locate the line on which you want to bid.



- 2. Click on the line link to the far right of the line information. The *Line Details* screen loads.
- 3. On the *Line Details* screen you may:
 - A. View documents (i.e. specifications) that are attached to the line.
 - B. Address event questions that are attached to the line (i.e. adding brands and models).
 - C. Read attachments.
 - D. Enter your unit bid price.
- 4. To return to the expanded *Event Details* screen, click the button.

Accessing Line Bid Factors

Line bid factors are questions that a bidder must answer in order to effectively and completely submit a bid on an event. Line bid factors are displayed on the *Line Details* screen if they are assigned to a line. The most common line bid factor questions are ones pertaining to brand and model of products.

To access the *Line Details* screen, do the following:

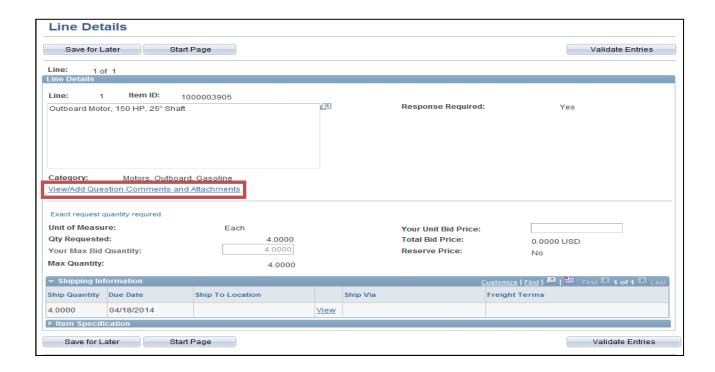
1. From the *Event Details* screen, click at the end of the line for the line item. The *Line Details* screen loads.





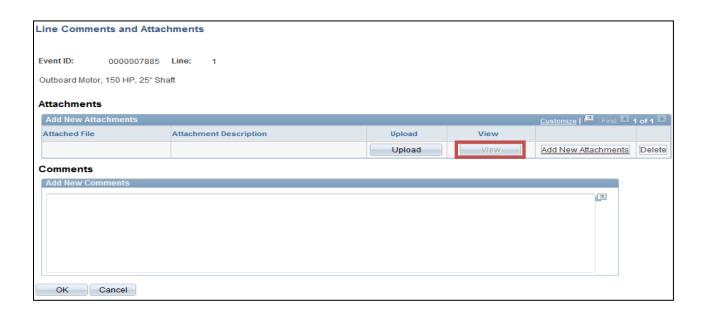
The Line Details screen provides more in-depth options for placing bids. From this page attachments to the line can be viewed, bid factors associated to the line can be addressed (i.e. adding brands and models), or comments can be reviewed and made.

2. To view attachments or comments or to upload attachments or comments, for the line item, click the <u>View/Add Question Comments and Attachments</u> link. The *Line Comments and Attachments* screen loads.



3. To view attached line documents, click the **View** button next to the document to view it. In the screen shot below, the View button is not accessible because documents are not attached to the

line item. If documents are attached to a line item, the View button will be accessible (appear as the Upload does with the word "View" in black text).

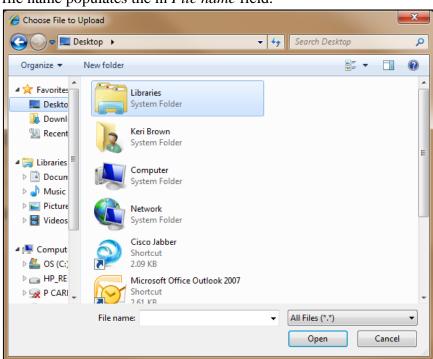


File Attachment

Upload Cancel

- 4. To upload a document to the line item, click

 Upload
- 5. In the *File Attachment* box, click **Browse**.
- 6. In the *Choose File to Upload* box, navigate to where the documentation is saved.
- 7. Select the documentation. Verify the file name populates the in *File name* field.
- 8. Click **Open**. The File Attachment box is displayed again.
- 9. In the File Attachment box, verify the file pathway populates in the Browse... field.
- 10. Click Upload in the File Attachment box.
- 11. Verify the document populated in the *Attached File* area of the *Add New Attachments* section.

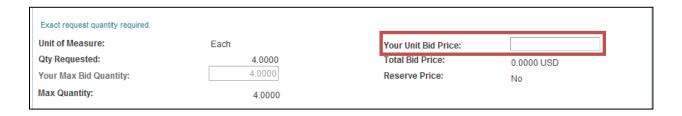


Browse...

12. In the Attachment Description field, type the name of the document.



- 13. To add comments, type the information in the *Comments* section.
- 14. Click when finished to return to the *Line Details* screen.
- 15. Enter the bid price in the **Your Unit Bid Price** field.

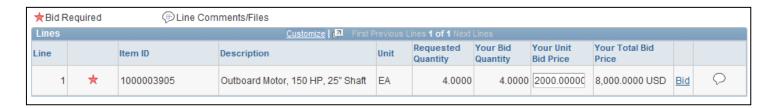


16. Respond to the **Line Questions** under the *Line Questions* header.



Line questions are not shown in the above screen shots. The Line Questions section will look similar to the Event Questions section, where Event Questions are answered for the entire event. Refer back to <u>pages 8-9</u> to see what the Events Questions section looks like.

17. Once all information has been entered for the line item, click to return to return to the *Event Details* screen.





Notice the Unit Bid Price entered on the Line Details screen has populated for the line item. Also, notice the Line Comments/Files icon. If documents were uploaded/attached, there will be dotted lines in the bubble icon.

Submitting a Bid

Once all bid information has been entered on the expanded *Event Details* screen, do the following to submit the bid:

1. Click the Submit Bid button at the top or the bottom of the *Event Details* screen. This will populate



The Bid Confirmation: Important Warning!! screen.

Event Details

2. Click if all the bid information is correct.



Welcome, State of Tennessee

User: TN Buyer- Matt Ross

Submitting an Alternative Bid

Instances may exist where after submitting an initial bid, there is a need to submit an alternative bid. To submit an alternative bid, complete the steps outlined on the following pages. Navigate to the *Event Details* screen via the following pathway.

Main Menu > Manage Events and Place Bids > View Events and Place Bids

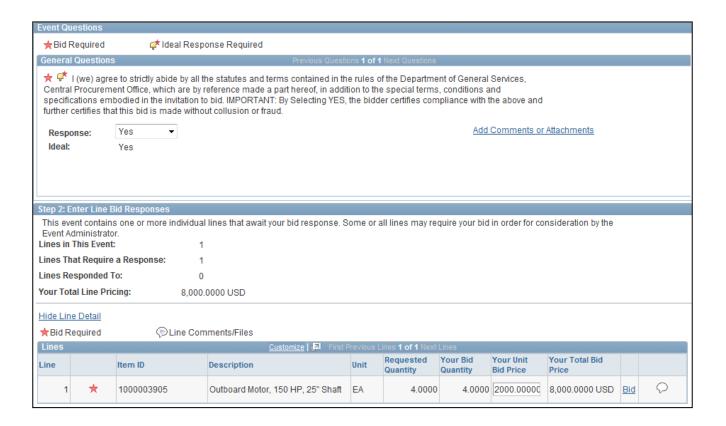
- 1. Click Main Menu.
- 2. Click Manage Events and Place Bids.
- 3. Click View Events and Place Bids.
- 4. Click on the **View, Edit, or Copy from Saved Bids** link in the *Bidding Shortcuts:* section. This will populate the *View, Edit, or Copy from Saved Bids* screen.



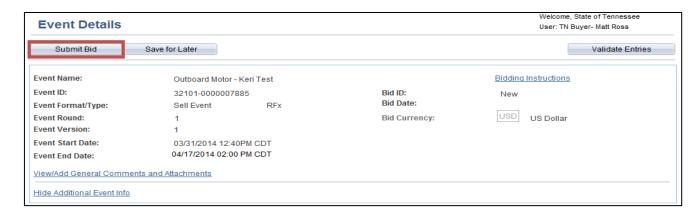
5. In the *Bids* section, identify the bid to submit again with alternative information. Click The will populate the *Event Details* screen.



6. The bid with previously submitted information is displayed. Navigate to the areas where the information is located that is to be changed.



- 7. Enter the alternative information, responses, bid prices, etc. into the appropriate fields.
- 8. When all necessary changes have been made, click Submit Bid at the top or bottom of the *Event Details* screen.



9. The *Bid Confirmation: Important Warning!!* screen loads. Read the information at the top of the screen. Review the information pertaining to your bid on the event.



10. Click if all the alternative bid information is correct.

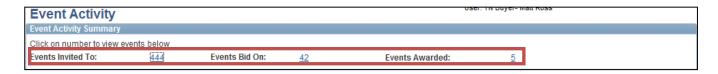
Viewing My Event Activity

A Vendor can view previous event invitations, event bids, and event awards from the Event Activity screen. Follow the steps below to navigate to the **Event Activity** screen.

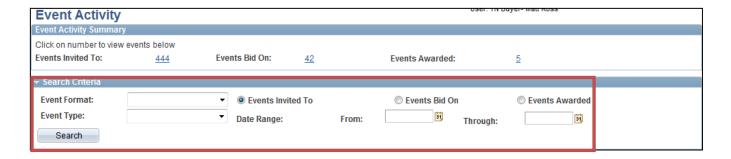


- 1. Click Main Menu.
- 2. Click Manage Events and Place Bids.
- 3. Click My Event Activity.

By click on the links shown below a Vendor can view event invitations, event bids, and events awarded.



The Search Criteria feature can be used to search for specific events.

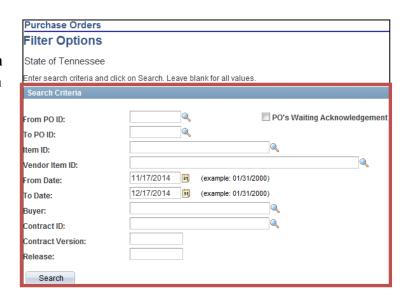


Viewing Purchase Order

A Vendor can view purchase orders to verify the items that have been ordered in the Edison system. Follow the steps below to navigate to the **Purchase Order** screen.

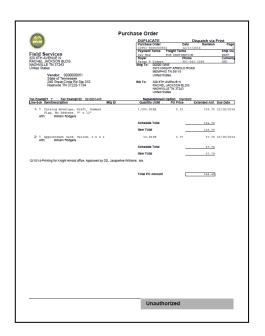


- 1. Click Main Menu.
- 2. Click Manage Orders.
- 3. Click Purchase Orders.
- Enter information into the Search Criteria fields. If no information is know the From Date and To Date can be adjusted.
- 5. Click Search.





6. Confirm the Purchase Order number and click on the **View PDF** link. This will populate a PDF copy of the Purchase Order, an authorization of order.

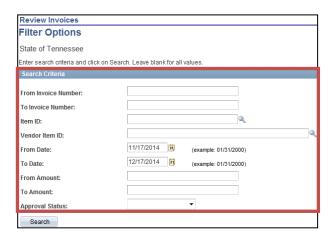


Viewing Invoices

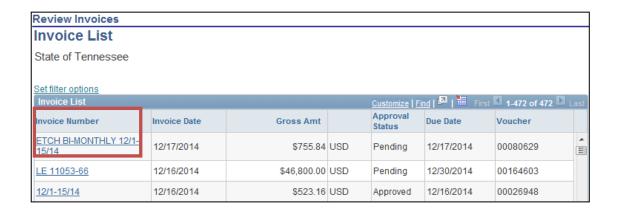
A Vendor can use the Viewing Invoices feature to monitor invoices an approval of invoices. Follow the steps provided below to navigate to the Review Invoices screen.

Main Menu > Review Payment Information > Invoices

- 1. Click Main Menu.
- 2. Click Review Payment Information.
- 3. Click **Invoices**.
- 4. Enter information into the **Search Criteria** fields. If no information is know the **From Date** and **To Date** can be adjusted.
- 5. Click Search.



This will populate the Invoice List. This list will include the Invoice Number, Invoice Date, Gross Amount, Approval Status of the Invoice, The Due Date, and Voucher number.

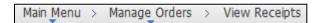


6. Click on the **Invoice Number** link to populate the Invoice Details screen. From this screen additional information about the Invoice can be collected.

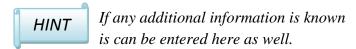


Viewing Receipts

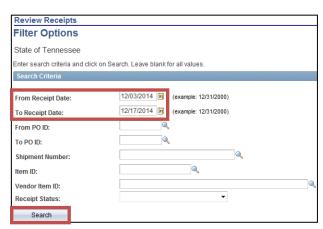
A Vendor can view receipts to verify that an item has been delivered and received in the Edison system. Information such as the date received, quantity, and price can be confirmed on this page. If necessary, inspection information can also be verified on this page. Follow the steps below to navigate to the **Review Receipts** screen.



- 1. Click Main Menu.
- 2. Click Manage Orders.
- 3. Click View Receipts.
- 4. Enter the **From Receipt Date**.
- 5. Enter the **To Receipt Date**.



6. Click Search.



The search result will populate and provide the Receipt Number, Received Dated, PO Number, Item ID, Description, the number of received items, UOM, and the Status of the item.



7. Click on the **Receipt Number** link to populate the Receipt Details screen.

